
TRAVEL STUDY

2021 VISITOR PROFILE

Essex County, New York

Regional Office of Sustainable Tourism (ROOST)



Photo credit: ROOST

PlaceMaking

April 2022

EXECUTIVE SUMMARY

Introduction

The Regional Office of Sustainable Tourism (ROOST) in Essex County, New York commissioned this study, for the eighteenth (18th) year, to measure traveler information and key marketing program statistics for Essex County, New York. ROOST is responsible for marketing Essex County's tourism assets. Research is targeted for the leisure travel market and excludes group and business visitors.

As with data collection for the 2020 year, 2021 continued unprecedented disruption resulting from the COVID-19 pandemic. As such, the researchers and ROOST recognize the unusual time of visitation and social trends during 2020 and caution against direct comparison to other years of research. During 2021 travel began to rebound but patterns were still altered substantially due to COVID-19 impacts on the travel industry.

ROOST contracted with PlaceMaking, a regional community and economic development research firm to complete this study. ROOST sent a jointly created survey tool to a sample of its 2021 leisure travelers to Essex County. Visitors were requested to complete an online survey (via social media and email) and the results were compiled from the responses received specifically from visitors who spent most of their time in Essex County.

The end-product of this research includes detailed visitor information, estimated traveler expenditures and analysis and an estimated return on investment (ROI) for county-level marketing expenditures. ROOST measured a total of 198,439 traceable leads who were interested in visiting Essex County in 2021. PlaceMaking also conducted similar research for neighboring Hamilton County and for the cumulative two-county region. The number of traceable leads for the two-county region was 211,930. A regional summary and ROI analysis is provided under separate cover.

Survey Respondent Data Summary

Highlights of 2021 visitation to Essex County from all survey respondents included:

Demographics and Visit Information

- Average visitor party age of respondents was 58 years old, slightly older than the five-year average of 55 years.
- Respondents included 60% female and 40% male.
- 94% of visitor respondents were of white ethnicity; with approximately 1% each reporting Native American and Hispanic, less than 1% African American, 2% mixed race and 2% Asian.
- The average reported total traveler party size declined from the record high party size of 2020 (4 adults and 1 child) to 2.5 adults and 0.75 child. This is closer to the longer-term average reported party size.
- About 3 out of 4 respondents (74%) reported that they were NY State resident visitors, dropping from about 4 out of 5 (79%) in 2020.
- Northern NY and the Capital district were the most frequent visitors from this group at 37%, followed by Central/Western New York visitors at 29%. Only 8% of visitors reported came from downstate/NYC region in 2021.
- Northeastern state visitors outside of NYS rose slightly to 18% of respondents. Out of state visitation from those outside the Northeast recovered slightly from the prior year to 7% of the group.
- Not surprisingly, with the continued closure of the border for most travel through 2021, Canadian visitors dropped greatly to less than 1% of respondents.
- Average duration of stay reported by 2021 travelers dropped substantially from the extreme high of 6.5 years reported by 2020 visitors. The average length of stay for 2021 visitors is reported at 3.3 nights, slightly below the 5-year average of 3.7 (which is skewed by the 2020 figure).
- The times that travelers noted visiting the region in 2021 showed, for the first time, visitation most commonly in peak fall (September/October- 29%). This was just ahead of the peak summer season (July/August- 24%). January/February (11%) reported visitation fell from the prior year (15%). Reported May/June (16%) and November/December (10%) remained consistent from the year prior.

- Hotels/motels remained the most reported lodging choice among 2021 traveler respondents by a high margin (43%).
- Short-term rentals were reported as the second most common lodging choice used by 16% of respondents. Respondents reported staying with family and friends (15%) in greater numbers than in prior years. Second home use (12%), camping (11%) and bed and breakfast (3%) stays remained relatively consistent from prior recent years.

Interests

- The most reported draw in visiting the region continued to be outdoor activities, with 61% of respondents selecting this attraction to visit.
- “Relaxing, dining and shopping” remained the second-most commonly expressed reason to visit the area, selected by 56% of respondents. Sightseeing (44%) and visiting friends (24%) rounded out the top four areas of expressed interest. Seventeen percent (17%) of respondents reported visiting Olympic sites as an attraction.
- Eighty percent (80%) of respondents who indicated that they came to the area for outdoor activities stated that hiking was an activity of primary interest. Reported interest in canoeing or kayaking was the next most common reported outdoor interest (28%), followed by fishing (18%).
- Boating was expressed as an outdoor activity of interest by 14% of respondents. The winter pursuits of cross-country skiing/snowshoeing were reported of interest by 9% and skiing/boarding by 7% of respondents.
- A question regarding hiking preferences continues to indicate strong preference in casual hiking, with 68% of respondents indicating interest in day hikes, 32% in leisure and hard surface hiking and 26% in family hikes. Forty-sixer level hikes dropped somewhat from the prior year in expressed interest from 28% to 17% of respondents.

Traveler Spending and Conversion

- The average daily traveler party spending in 2021 was estimated at \$464 per day. This represents a 38% increase in daily spending from 2020 visitation figures, however much shorter average stays were reported in 2021 from 6.7 to 3.3 nights.
- The total average estimated trip expenditure was \$1,484, a 23% decline in total spending from 2020 reporting visitors. The 2020 year was exceptional because it reflected much higher spending due to abnormally long stays (due substantially to the pandemic and displaced work/vacation schedules). Removing this year as such for comparison, expenditures in all categories reported by 2021 visitors were comparatively high.
- Reported spending on lodging showed a near-high of \$679 per average stay.
- Average meals (\$287) and shopping (\$215) expenditures also were high in comparison with 5-year averages. Transportation costs also increased somewhat from prior reported years.
- Conversion measurement, the percent of travelers who stated that the information or marketing viewed either reinforced potential plans to visit or helped them decide to take an unplanned trip was 80%, just below the five-year average of 81%.
- ROOST received 198,000 individual contacts through its marketing efforts for Essex County in 2021. This represents a healthy 18% increase over inquiries from 2020.

METHODOLOGY

The Regional Office of Sustainable Tourism (ROOST) engaged PlaceMaking to conduct research through a visitor survey for the tenth year. The study has employed similar methodology with comparable results for 18 years. PlaceMaking and ROOST collaboratively designed the survey instrument to gather information from its leisure visitors, and to measure regionally the return on investment of marketing expenditures. As ROOST represents the tourism marketing interest for numerous

Adirondack communities, the survey of 2021 travelers also included adjacent Hamilton County. Traveler studies for the two-county region (including also the Village of Tupper Lake in Franklin County) and for Hamilton County individually are provided under separate cover.

Researchers parsed survey results by where the traveler indicated spending the most time to achieve individual county level results. This is not an exact measure, but the researchers believe that this provides reasonable results as the methodology is consistent per county and has shown reliability across multiple applications.

ROOST distributed the survey electronically to a sampling of its electronic database of visitors inquiring about visitation to Essex County during 2021. Surveys were collected quarterly this year throughout 2021, a new manner of timely data collection. Within the month following each travel quarter, ROOST sent the surveys electronically to a sampling of visitors who had inquired about traveling during that period. This allowed surveys to be modified very slightly by seasonal activities and particularly to improve trip data recollection nearest to actual date of travel.

The visitors invited to participate in the survey represent traceable direct inquiries generated by the office's marketing efforts which resulted in individuals providing their contact information. This included respondents who requested travel information through the internet, by telephone, through social media outlets (Twitter, Facebook, Instagram and YouTube), website, printed materials and in-person visits. This study does not take into consideration the potentially large group of individuals who view travel materials and are then subsequently influenced to travel to the area, but do not provide traceable information.

The survey instrument is predicated on national and regional research with a similar purpose and refined based on the experience of tourism professionals. The on-line survey was attractively designed and provided unique Adirondack-related incentives to randomly selected respondents for survey completion. The opinion of the researchers is that incentives contribute to a higher survey return rate without skewing data.

ROOST sent a total of 68,000 invitations successfully through electronic mail to Essex County visitors. Of this group, 4,302 responses were received for a 6.3% response rate. Of this, just over 800 responses were received by an additional Facebook post.

The project team for this research is consistent with previous years of study, including project manager Victoria Zinser Duley- AICP, Principal with PlaceMaking, John

Parmelee, CHIA- faculty member of the SUNY Plattsburgh Department of Hospitality Management and Lisa Cyphers- Statistician.

RETURN ON INVESTMENT ANALYSIS

Return on investment (ROI) is measured by estimated expenditures directly generated by visitors and divided by the total marketing dollars spent by ROOST (occupancy tax dollars) in Essex County.

The first step in this process is to estimate total revenue generated by leisure visitors to the county, who were influenced by ROOST marketing materials, by multiplying the number of traceable inquiries by the average gross conversion rate, daily traveler expenditures and length of stay:

198,439 (number of direct, traceable inquiries) x 80% (gross conversion factor) x \$463 (mean traveler party expenditure per day) x 3.3 (mean length of stay in nights)

= \$242,555,958 (total estimated revenue generated by travelers influenced by ROOST in 2021)

The second step in this process is to divide the total revenue generated by visitors by the marketing dollars spent through 2021 Essex County marketing budget:

\$242,555,958 (total estimated traveler revenue) / \$2,750,993 Essex County marketing budget)

Return on Investment (ROI) = 88:1

The above calculations show that the total estimated revenue generated *directly* by visitors touched by ROOST was over \$242 million. This produces an estimated ROI of \$88 in leisure traveler-related revenue for each occupancy tax dollar expenditure. This includes only direct spending impacts, not the secondary or tertiary multipliers that result from this direct spending that would be much higher.

CONCLUSION

The COVID-19 pandemic continued through 2021, with continued shifts in all societal patterns, including less travel. ROOST played a key leading role in promoting more localized tourism and return to broader markets with safety policies such as masking even on outdoor main streets. ROOST worked with its tourism assets and hospitality partners to assist re-opening and serving a COVID-19 impacted tourism population that was visiting the region.

2021 showed a return toward more typical visitor patterns, with the large exception of near absence of Canadian visitors due to border restrictions. While certain markets such as sports tournaments/events and group meetings were limited, family and extended family trips continued to be popular. Essex County continued to rebound quickly, ahead of many other national markets.

Overall county occupancies saw a recovery during 2021, although not to 2019 levels. Full recovery is anticipated during 2022. Another bright spot is that the average daily rate (ADR) charged by lodging facilities increased an additional 14.7% during 2021 after a 9% increase in 2020¹. This substantiates the trend of reported higher lodging expenditures seen in the survey and emphasizes real revenue growth and potential.

A return of visitors from areas further afield than NY state occurred during 2021 which is an encouraging trend to monitor in future years. The extremely long stays on average reported from 2020 reduced to a much more typical length of stay in 2021. Similarly, the average party size reported in 2021 also dropped back to more typical levels. The 2020 "COVID-pod" travel of larger groups appears to have shifted back to more normal smaller family or friend groups. Short-term rentals continued to be a strong portion of visitor accommodations.

Although overall expenditures dropped due primarily to shorter stays, nearly all *daily* expenditure categories reported all-time highs. Daily expenditure levels, particularly in key areas of lodging and meals, have been on a steady growth trend even before recent months of inflation. This is a strong point for continued regional economic impact.

The U.S. Travel Association³ calculated domestic travel growth nationwide for 2021 over 2020 levels, but which were far lower than 2019 (pre-pandemic). The leisure market was estimated to have improved by approximately 12% from 2020 but still well below

the 2019 levels. Business and international travel are still far below these domestic leisure travel rates.

It appears from study findings that ROOST positioned its marketing to address travel recovery opportunities. A strong return on investment was found at 88:1, just below the 5-year average.

The research team continues to discuss the broader impact of regional tourism on Essex County visitor assets, and areas by which to expand traveler data collection accordingly. Considering the global pandemic recovery, these data show a bright spot for economic recovery in the tourism industry in Essex County in 2022 and beyond. The higher levels of daily spending are a strong point to continue to grow the regional economy.

These data can continue to be used to enhance and evaluate future marketing efforts, techniques, and marketing channels for the agency. All social patterns were highly disrupted during 2020 and 2021 by the COVID-19 pandemic, with travel being no exception. Therefore, it is important to be cognizant that direct comparisons of the results of this year's data to other years should be done cautiously.

Table 1 below summarizes key Essex County traveler data ascertained by this survey during the last five years of data collection.

**TABLE 1. KEY FACTS DERIVED FROM SURVEY DATA-
5-YEAR COMPARISON**

	5 Year Average	2021	2020	2019	2018	2017
Number of Completed Survey Responses	2,803	4,302	2,682	3,070	1,975	1,990
Median Income of Respondents	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Mean Age of Respondents	55	58	53	56	54	53
Respondent Gender	57% Female 43% Male	60% Female 40% Male	58% Female 42% Male	52% Female 48% Male	56% Female 44% Male	59% Female 41% Male
Direct Inquiries to Essex County via ROOST	220,221	198,439	161,763	297,064	216,933	226,908
Average Night Stays/ Party	3.7 Nights	3.3 nights	6.7 Nights	3.0 Nights	2.8 Nights	2.8 Nights
Average Party Size	4.3 Persons	3.3 Persons	7 Persons	3.4 Persons	3.9 Persons	3.9 Persons
Conversion Factor Rate	81%	80%	83%	80%	79%	83%
Average Daily Expenditure per Party	\$384	\$464	\$283	\$419	\$415	\$340
Average Total Expenditure per Party per Trip	\$1,336	\$1,482	\$1,838	\$1,265	\$1,151	\$943
Marketing Budget	\$2,731,584	\$2,750,993	\$2,636,397	\$3,001,292	\$2,725,222	\$2,544,018
ROI	85:1	88:1	94:1	100:1	73:1	70:1

SOURCES CITED

1. Smith Travel Research, Inc. (property of Lake Placid CVB)- "Trend Report Essex County NY". 2022.
2. Statista.com. "Domestic Travel Spending"
3. U.S. Travel Association. "Travel- Forecasts" ustravel.org 3/30/22